**Billing Codes in EAS**

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References:

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| EASi Functional Requirements for UI Screens | G:\LTS\Library Projects\EASi\EASi\_Functional\_Req\_UI-Screens\_2010.doc |

**Packets**

*Current Implementation*:

At packet submission time, the billing code is optional.

If a user enters a billing code, it is not stored with the packet, but is applied to all the items within the packet.

*Proposed Implementation*:

At packet submission time, the billing code will be mandatory.

This billing code will be stored with the packet – and will be propagated over to DRS with the packet when the packet is pushed to DRS.

There will be the option (probably via a checkbox) to permit the user to apply the packet billing code to all the items within the packet.

This will allow the user to continue to have the convenience of the option of applying the billing code to all the items at packet submission time while enforcing the application of a billing code to the packet object itself.

**Collections**

*Current Implementation*:

At packet submission time, the collection is mandatory.

It is associated with both the packet and all it’s associated items.

There is no logic associating the billing code of the collection with that of the items in that collection.

*Proposed Implementation*:

At packet submission time, the collection will be optional.

It will continue to be associated with both the packet and all it’s associated items.

There may be logic associating the billing code of the collection with that of the items in that collection. **Please see following for a question on this topic**.

**Question regarding Collections and Billing Codes:**

In the EASi Functional Requirements for UI Screens page 6:

View and process emails– brief display

Processing actions on select emails

Set Billing Code

(populated by default set at Manage Collection, but can be

overwritten)

My interpretation of this requirement is that the drop down list should be populated with the default value for the collection which was chosen when creating/editing the collection.

This does not make much sense since the set may well contain items from multiple collections. I had assumed that this requirement was obsolete.

In a discussion with Wendy, her interpretation is quite different and part of it would involve a significant amount of work to implement.

*In this scenario:*

1.

At packet submit time, if a collection is chosen, all the items in the packet are assigned to the collection AND the collection’s billing code.

This should not be too difficult to implement.

2.

Individual items or sets of items may have their billing code overwritten on the brief display, or the full item displays.

This involves no changes to EAS.

3.

If a user changes the billing code of a collection, it should be applied to all the items in the collection.

This is problematic:

* If items in the collection have already been moved to DRS – will their billing code be automatically updated in DRS when the collection billing code is updated there?
* It could involve updating thousands of items in the collection.
* If the user has manually assigned a different billing code to certain items in the collection should they be overwritten?
* If a user updates the billing code for a collection in DRS this results in a further synchronization issue between DRS and EAS. This information will need to be propagated back to EAS and all items updated accordingly.

4.

If a user moves items from one collection to another, they should be assigned the billing code of the new collection.

This is problematic:

* If the user has manually assigned a different billing code to certain items in the collection should they be overwritten?

Items 3 and 4 involve quite a bit of work in EAS (Item 3 might also involve quite a bit of work in DRS) and are problematic.

I would propose that as a compromise I implement item 1 and users would need to manually assign billing codes to items after ingest.

*This adds an extra validation check to the submit packet page:*

If a user chooses to apply the packet billing code to all items in the packet and they also enter a collection for that packet – there is a conflict – which billing code should be used?

This could be handled by:

Issuing an error which states there is a conflict and preventing submission of the packet

OR

Assign the packet billing code to the items if that checkbox is checked

otherwise

Assign the collection billing code

The latter option has the advantage of permitting the user to assign a collection to all the items in a packet but to also assign them a billing code that differs from that of the collection. However, I don’t know if that is something people might want to do.